

KelseyPortal Onboarding Guide

Last modified August 5, 2022



Table of Contents

How to Access the KelseyPortal.....	<u>2</u>
How to Setup Your Profile.....	<u>4</u>
How to Upload Your Profile Documents.....	<u>6</u>
How to Take the Certification Test.....	<u>9</u>
What to Do if Your Document is Rejected.....	<u>12</u>
Final Approval or Rejection.....	<u>15</u>
Frequently Asked Questions.....	<u>16</u>

How to Access the KelseyPortal

Step 1: You will be sent an invitation via email. Follow the instructions as shown below

From: KCABrokerSupport@KelseycareAdvantage.com

Subject: You're invited to onboard with KCA



Hi _____

You have been invited to onboard with KelseyCare Advantage for 2023 and register into our new KelseyPortal!

Please have the following items ready as you register on our site:

1. Valid government ID
2. Valid Texas DOI license
3. E&O certificate
4. Current AHIP certification

Additionally, you will need to read and sign the Independent Agent Agreement, review the KelseyCare Advantage 2023 training course, and when ready, take the certification test.

You may access the portal using the following credentials:

Website: <https://kelseyportal.kelseycareadvantage.com/>

UserID: your email address

Temporary Password: RandomPassword

Upon approval of your registration, you may enroll your clients online, submit paper applications, view pending applications, and much more!

We appreciate your interest and look forward to working with you soon!

KelseyCare Advantage Broker Support Team

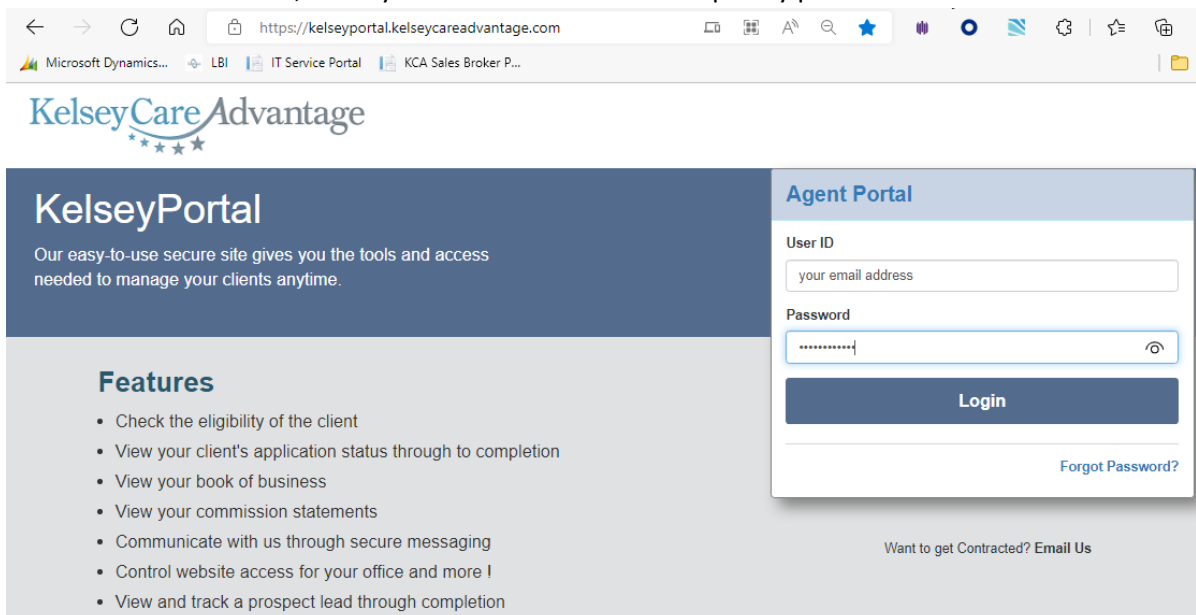
kcabrokersupport@kelseycareadvantage.com

713-442-4949

KelseyCareAdvantage.com

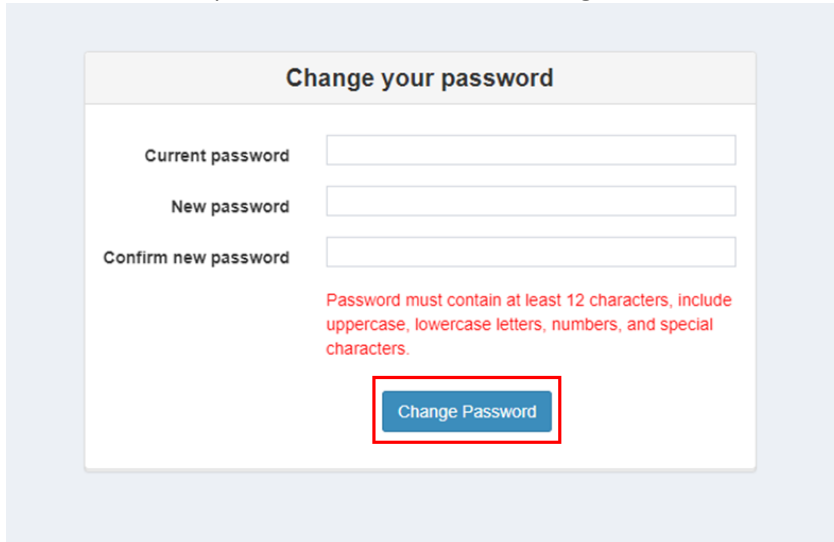


Step 2: Click on the website link, enter your email address and temporary password



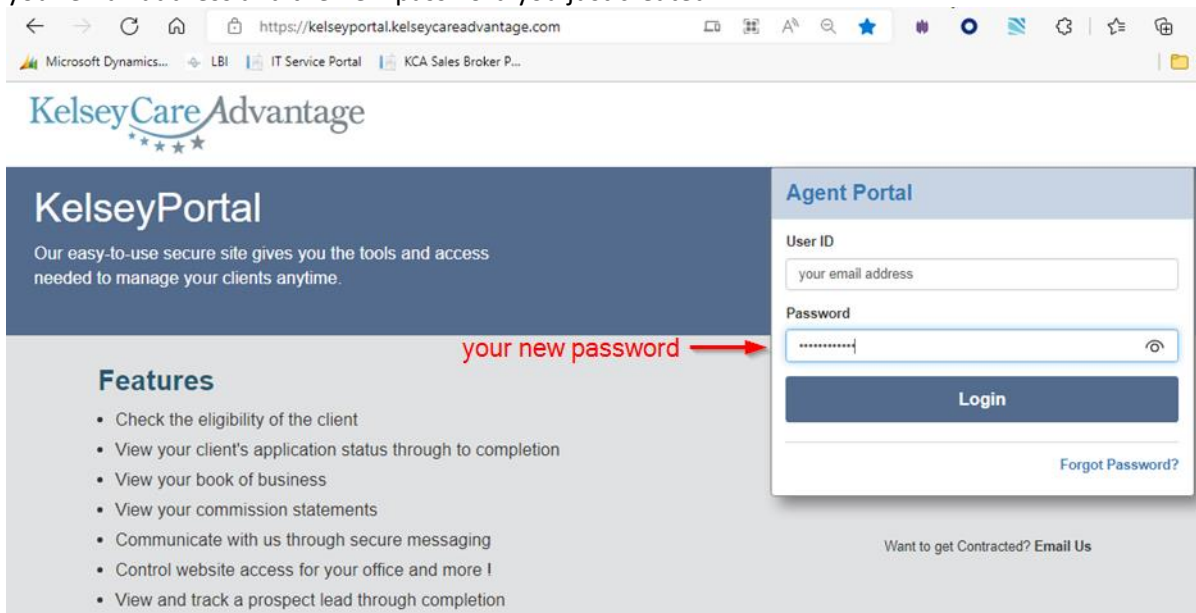
Step 3:

You will be prompted to change your password. Type the temporary password once again in the “Current Password” field, then create a new password and type it in the New Password field, then once again in the Confirm new password field. Click the **[Change Password]** button to confirm



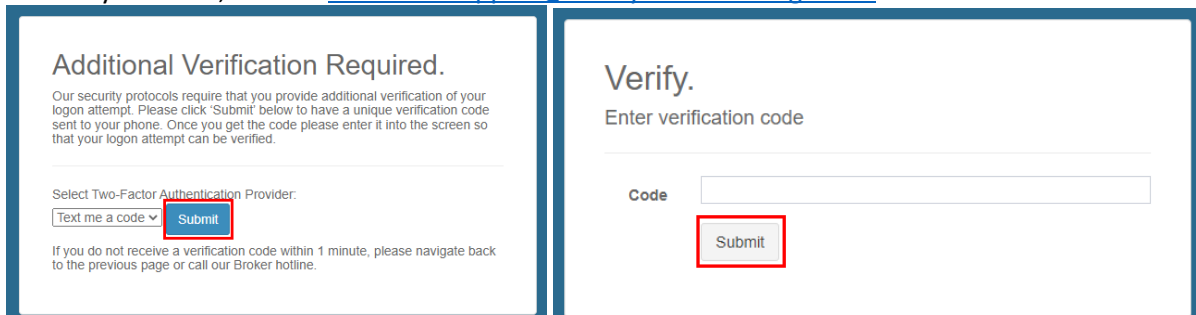
Step 4:

Once your new password has been accepted, you will be taken back to the main log in screen. Re-enter your email address and the new password you just created



Step 5:

You may be asked for additional verification. Click the **[Submit]** button to receive a text message with a code. Once you receive the text, type in your 6 digit code & click the **[Submit]** button. If you do not receive your code, contact kcabrokersupport@kelseycareadvantage.com





How to Setup Your Profile

Step 1a:

Upon logging in, you will see a welcome screen. Click on the **[Continue to Certification]** button to move to the next step

Agent Portal **Certification** **My Account** Search...

Welcome to the KelseyCare Advantage Broker Certification

First time brokers
In the ensuing pages, you will be directed to:

- Confirm your DOI License Nbr and NPN Nbr
- Verify your profile
- Answer some compliance questions
- View and sign a compensation agreement
- Upload certain required documents
- Review training materials
- Take a test

Returning Brokers
In the ensuing pages, you will be directed to:

- Confirm your DOI License Nbr and NPN Nbr
- Verify your profile
- Review training materials
- Take a test
- Update your Profile & Provide updated documents

Continue to Certification

Step 1b:

If you do not land on the certification screen upon logging in, simply click on the drop-down box on the top right and select Certification

KelseyCare Advantage

KelseyPortal

Agent Portal **Applications** **My Account** Search...

Applications Dashboard

Applications
Configuration
Certification

Total App Entered 0
No. of Duplicate App 0
Max No. of Apps by an Agent 44
No. of App entered today 0
No. of App entered Last Week 0
No. of App entered Last Month 0

Enrollment Trend - Compared to previous 2 Years
Enrollment by PBP for Current Year

Step 2:

Confirm that the License Number & NPN # is correct, then click the **[Next]** button

Please enter DOI and NPN







License Number: 2937d612
NPN #: 83gd6194
Selling Market: Texas

Lookup NPN


Next

Step 3:

Fill in your contact information (red boxes) and confirm that the information on this screen is correct. You do not have to fill in the TAX ID if you don't have one. Disregard the checkbox for Independent Agent. Click the **[Next]** button to move to the next step



Step 1 - Please enter or confirm your Profile

First Name	Middle Initial	Last Name	Email
<input type="text" value="Peter"/>	<input type="text"/>	<input type="text" value="Quill"/>	<input type="text" value="your email address"/>
DOB	NPN	DOI	TAX ID
<input type="text" value=""/> 	<input type="text" value="83gd6194"/>	<input type="text" value="2937d612"/>	<input type="text"/>
Address 1	Address 2	City	State
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="TX"/>
Zip	Phone Number	Contracted Agency	<input checked="" type="checkbox"/> I'm an Independent Agent
<input type="text"/>	<input type="text"/>	<input type="text" value="your agency name"/>	<input type="checkbox"/>



How to Upload Your Profile Documents

You will be instructed to upload one of each: AHIP, E&O, DOI and Government ID

Step 1:

- 1) Select the document type
- 2) Set the expiration date
- 3) Click on **[Choose a File]** to find & select the document on your computer, click **[Open]**
- 4) Click the **[Upload]** button to add your selected document to the screen below



Step 2 - Upload Documents required by the Health Plan

Please upload the following documents. Please Note the following.

- Document Size cannot be greater than 5 MB
- Only documents of type JPG, JPEG, PNG, PDF, XLS, XLSX, DOC, DOCX and TIFF are accepted

Document Type

AHIP

Expiration Date

Document Location

Choose a file...

Upload

Previous

Next

Document Type	Expiry Date	Status	File Name	View	Download
---------------	-------------	--------	-----------	------	----------

Step 2:

Repeat steps 1 through 4 until you have 4 uploaded documents showing. Click on the **[Next]** button to move to the next step ***The Expiration Date on your AHIP should be left blank***



Step 2 - Upload Documents required by the Health Plan

Document Uploaded Successfully.

Please upload the following documents. Please Note the following.

- Document Size cannot be greater than 5 MB
- Only documents of type JPG, JPEG, PNG, PDF, XLS, XLSX, DOC, DOCX and TIFF are accepted

Document Type

AHIP

Expiration Date

Document Location

Choose a file...

Upload

Previous

Next

Document Type	Expiry Date	Status	File Name	View	Download
TX ID	12/31/9999	Pending	Quill_Peter_TX ID_07202026_072820221042..png	View	Download
DOI	04/05/2023	Pending	Quill_Peter_DOI_04052023_072820221042..pdf	View	Download
AHIP	02/16/2023	Pending	Quill_Peter_AHIP_02162023_072820221041..pdf	View	Download
E&O	01/31/2023	Pending	Quill_Peter_EO_01312023_072820221041..pdf	View	Download

Step 3:

Answer YES/NO for the compliance history on the Independent Agent Agreement form. Click on the button **[Click here to View the Agreement]**

Step 3 - Review and sign Agent/Agency Compensation Agreement between KelseyCare Advantage

And

Agent Name:	Ins Lic #:	NPN#:
Peter Quill	2937d612	32657412
Address:		
6581 MILKY WAY		
City:	State:	Zip Code:
HOUSTON	TX	77508
Phone:	Email:	

Compliance History:

Please answer each Question with YES or NO

	Yes	No
1. Have you ever been convicted of or pleaded guilty or no contest to:		
a. Fraud, embezzlement, forgery false statements, counterfeiting, extortion, or any other act involving the misappropriation of funds?	<input type="radio"/>	<input checked="" type="radio"/>
b. A conspiracy to commit any of the above offenses?	<input type="radio"/>	<input checked="" type="radio"/>
2. To the best of your knowledge, are you now or have you ever been the subject of ANY complaint, investigation, Letter of Admonishment or proceeding by any Insurance Department, the SEC, or any federal or state regulatory agency?	<input type="radio"/>	<input checked="" type="radio"/>
3. Do you have unsatisfied judgments or liens against you, or any pending investigation in which you are a defendant?	<input type="radio"/>	<input checked="" type="radio"/>
4. Are you currently a party, or in the past ten years, have you been a party, to any lawsuit, arbitration or civil litigation?	<input type="radio"/>	<input checked="" type="radio"/>
5. Have you ever been convicted of a felony?	<input type="radio"/>	<input checked="" type="radio"/>
6. Have you personally or have any business in which you had control or an ownership interest been (or currently are) the debtor in a bankruptcy, made a compromise with creditors, or had a direct payment procedure initiated under the Securities Investors Protection Act?	<input type="radio"/>	<input checked="" type="radio"/>
7. To the best of your knowledge, has any person ever complained to an insurance department or regulatory agency about your conduct?	<input type="radio"/>	<input checked="" type="radio"/>
8. Have you ever voluntarily resigned, been discharged, or permitted resignation after allegations were made that accuse you for:	<input type="radio"/>	<input checked="" type="radio"/>
a. Violating investment-related statutes regulations, rules or industry standards of conduct?	<input type="radio"/>	<input checked="" type="radio"/>
b. Fraud OR the wrongful taking of property?	<input type="radio"/>	<input checked="" type="radio"/>
c. Failure to supervise in connection with investment-related statutes, regulations, rules or industry standards of conduct?	<input type="radio"/>	<input checked="" type="radio"/>

Click here to View Agreement

The agreement will open in a new browser tab. Once you are done reviewing, close the tab by clicking "x"

Step 4:

Onboarding - Sales Broker Portal x Independent_Agent_Contract_20 x +

kelseyportal.kelseycareadvantage.com/Certification/SubmitStep2

Onboarding - Sales Broker Portal x Independent_Agent_Contract_20 x +

kelseyportal.kelseycareadvantage.com/Agreement/05/Independent_Agent_Contract_2021.pdf

Independent_Agent_Contract_2021.pdf

1 / 33 100%

1

2

3

4

KS PLAN ADMINISTRATORS LLC

INDEPENDENT AGENT AGREEMENT

This Independent Agent Agreement ("Agreement") is made and entered into by and between _____ as a Sales Agent as set forth on Exhibit 5 (collectively "Agent") and KS PLAN ADMINISTRATORS LLC and its Affiliates as defined herein (collectively, "Plan").

WHEREAS Plan is licensed as a health maintenance organization or insurer in the State and has or is seeking a contract with the Centers for Medicare & Medicaid Services ("CMS") to offer Medicare Advantage ("MA") plans in the State; and

WHEREAS Plan wishes to contract with Agent to provide marketing and sales services in connection with Plan's MA plans directly and indirectly through Sales Agents (as hereinafter defined).

NOW, THEREFORE, in consideration of the premises and mutual promises herein stated, the parties hereby agree as follows:

ARTICLE I

DEFINITIONS

1.1 Affiliate means an entity controlled by, controlling, or under common control with another entity including, but not limited to, through ownership of stock, joint venture, or membership interest. For purposes of this definition, "control" of an entity means direct or indirect ownership of a majority of the entity.

1.2 Administrative Services means the same as such term is defined in Section 3.1 ("Agent Obligations").

1.3 Attachment(s) means the attachments to this Agreement, incorporated herein by reference, including all Exhibits and Schedules.

1.4 Benefit Plan means the agreement, certificate of coverage, policy forms or other documents, together with any riders that describes the services that Plan has agreed to provide to Plan Members, as may be amended, modified, replaced, or supplemented from time to time by Plan.

click the "x" to close this tab

Step 5: Mark the 2 checkboxes below if you agree, sign then click the **[Next]** button

[Click here to View Agreement](#)

☒ I certify that the foregoing answers, including attachments, are TRUE and CORRECT to the best of my knowledge and belief.

☒ I hereby acknowledge that I have read through the entire Compensation Agreement Document attached to the link above and I agree to all the terms and conditions therein.

Agency: Hogwarts

Date: 07/28/2022

Agent Signature



[Clear Signature](#)

[Previous](#)

[Next](#)

You will receive a confirmation email along with a copy of the signed IAA

Step 6:

Please note after signing the IAA and you log out **without** completing the test, you will be required to re-sign the IAA the next time you log in. Each time you re-sign the IAA, you will receive a copy of the most recently signed IAA via email

Subject: **Copy of IAA for your records KCA**



Hi _____,

Thank you for logging onto the Broker Portal to complete your onboarding and certification.

Attached is a copy of the Independent Agent Agreement (IAA). **Please keep a copy of this document for your records.**

Thank you,

KelseyCare Advantage Broker Support Team
kcabrokersupport@kelseycareadvantage.com
713-442-4949
KelseyCareAdvantage.com





How to Take the Certification Test

Step 1:

Select the correct Year, Test Type is “Annual” and Plan is “All Benefits of KelseyCare Advantage”. Click on the [View Training Content] button to open a window to review the training.



Step 4 - Select the Training you wish to review

Passing this test will qualify you to sell All Plan Benefit Packages of KelseyCare Advantage

Year

Test Type

Plan

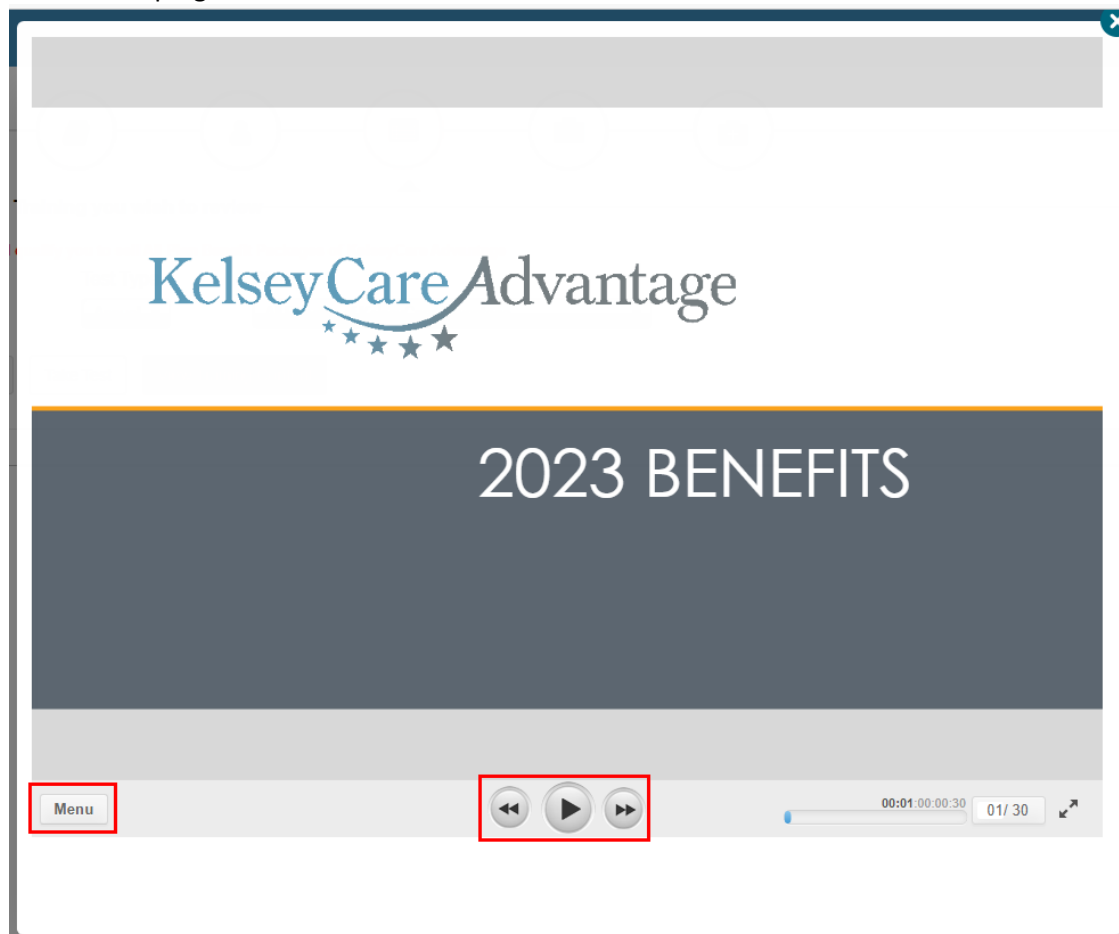
Previous

Take Test

View Training Content

Step 2:

Take your time in studying the training slides. Use the buttons at the bottom to move forward or backward. You may also click on the [Menu] button for additional notes. When you are finished, click the “x” in the top right corner of the box to close this window



Step 3:

Click the **[Download Training Material]** button to save a copy of the PDF and when ready, click the **[Start Test]** button to begin. Another pop-up window will appear for you to take your test



Step 5 - Take Test

Please note the following about our certification and training program

- Study the entire presentation before starting the test
- All questions must be answered
- A score of 85% or higher is required to pass
- You have 3 attempts to pass the test

[Download Training Material](#)

[Previous](#)

[Start Test](#)

A screenshot of a 'Test In Progress' pop-up window. The window has a title bar with a close button (X). The main content area shows 'Question 1' followed by a text input field. Below the input field are two radio buttons labeled 'TRUE' and 'FALSE'. At the bottom, it says 'Question 1 of 20' and a 'Next' button. A red box highlights the 'Next' button. In the background, a banner for 'Care Advantage' is visible.

Step 4a: If you fail, you will see the message below:



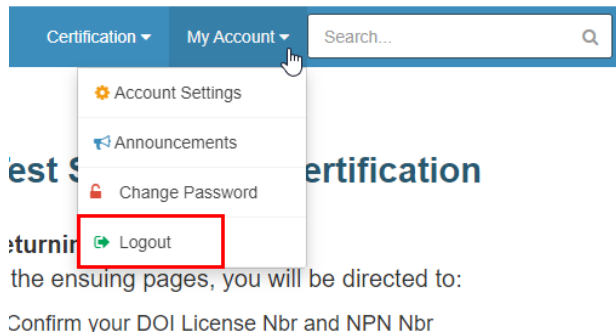
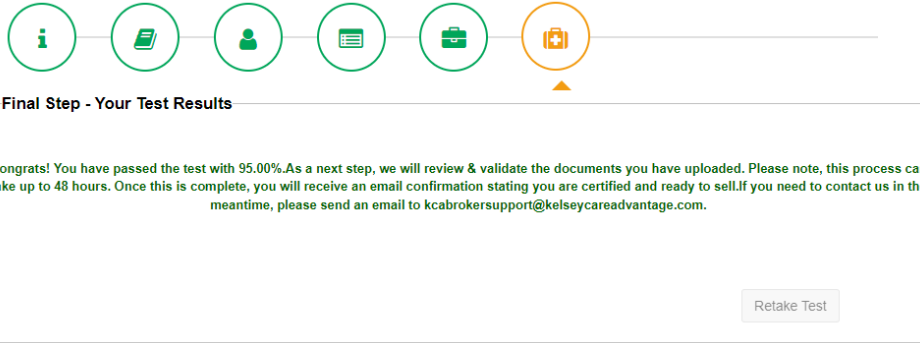
Final Step - Your Test Results

Sorry! You have failed the test. You scored 50.00%

[Retake Test](#)

Step 4b:

When you pass the test, you will see the success message below. To finish, you can simply close the browser window, or go to the top right corner of the screen, click on “My Account” and then [Logout]



Step 5:

You will receive a confirmation email upon passing the test as well

Subject: **KCA Certification Completed**



Hi _____,

You have successfully completed your certification for **2023-All Benefits of KelseyCare Advantage!**

The broker support team will now review your AHIP, DOI, E&O and ID to approve or reject these documents. This process may take up to 48 hours.

Once all documents have been approved, you will be notified via email that you are fully certified and ready to sell for KCA!

Thank you,

KelseyCare Advantage Broker Support Team
kcabrokersupport@kelseycaadvantage.com
713-442-4949
KelseyCareAdvantage.com





What to Do if Your Document is Rejected

Step 1:

If any of your documents (AHIP, DOI, E&O or ID) are not accepted, you will receive an email stating which document was rejected. You will need to re-upload the corrected document through the KelseyPortal

Subject: **Your document has been rejected**



Hi _____,

Your **AHIP** document that you provided as part of the Certification process has been rejected. Please re-upload the corrected document so we may proceed with the certification approval process.

If you have any questions, please contact us.

Thank you,

KelseyCare Advantage Broker Support Team

kcabrokersupport@kelseycareadvantage.com

713-442-4949

KelseyCareAdvantage.com



Step 2:

Login once again to <https://kelseyportal.kelseycareadvantage.com> and enter your username & password. Again, you may be prompted for additional verification



KelseyPortal

Our easy-to-use secure site gives you the tools and access needed to manage your clients anytime.

Features

- Check the eligibility of the client
- View your client's application status through to completion
- View your book of business
- View your commission statements
- Communicate with us through secure messaging
- Control website access for your office and more !
- View and track a prospect lead through completion

Agent Portal

User ID

Password

Login

[Forgot Password?](#)

Want to get Contracted? [Email Us](#)

Additional Verification Required.

Our security protocols require that you provide additional verification of your login attempt. Please click 'Submit' below to have a unique verification code sent to your phone. Once you get the code please enter it into the screen so that your login attempt can be verified.

Select Two-Factor Authentication Provider:

If you do not receive a verification code within 1 minute, please navigate back to the previous page or call our Broker hotline.

Verify.

Enter verification code

Step 3:

It will look like you need to take the certification test again, but you don't. Click on [**Continue to Certification**] to get to the next screen

Agent Portal Certification ▾ My Account ▾ Search...

Welcome to the KelseyCare Advantage Broker Certification

First time brokers
In the ensuing pages, you will be directed to:

- Confirm your DOI License Nbr and NPN Nbr
- Verify your profile
- Answer some compliance questions
- View and sign a compensation agreement
- Upload certain required documents
- Review training materials
- Take a test

Returning Brokers
In the ensuing pages, you will be directed to:

- Confirm your DOI License Nbr and NPN Nbr
- Verify your profile
- Review training materials
- Take a test
- Update your Profile & Provide updated documents

Continue to Certification

Step 4:

Again, bypass these 2 screens by clicking the [**Next**] button

Please enter DOI and NPN

License Number: 2937d612 NPN #: 83gd6194 Selling Market: Texas

[Lookup NPN](#)

Next

Step 1 - Please enter or confirm your Profile

First Name: Peter Middle Initial: Last Name: Quill Email:

DOB: 01/01/1900 NPN: 32657412 DOI: 2937d612 TAX ID:

Address 1: 6581 MILKY WAY Address 2: City: HOUSTON State: TX

Zip: 77508 Phone Number: Contracted Agency: Hogwarts


☐ I'm an Independent Agent

Previous **Next**

Once you make your way back to the Upload Documents screen, upload the corrected document following the same steps as before:

Step 5:

- 1) Select the document type that was rejected
- 2) Set the expiration date
- 3) Click on **[Choose a File]** to find & select the document on your computer, click **[Open]**
- 4) Click the **[Upload]** button to add your selected document to the screen below
- 5) Click the **[Next]** button to save and you may now exit the KelseyPortal



Step 2 - Upload Documents required by the Health Plan

Please upload the following documents. Please Note the following.

- Document Size cannot be greater than 5 MB
- Only documents of type JPG, JPEG, PNG, PDF, XLS, XLSX, DOC, DOCX and TIFF are accepted

Document Type: ① Expiration Date: ② Document Location: ③ ④

Previous Next

Document Type	Expiry Date	Status	File Name	View	Download	
CERT	Non-Expiring	Accepted	Peter Quill__20220728234220_Certification.pdf	View	Download	
AOC	12/31/9999	Accepted	Final_Peter_32657412_2937d612_07282022104523766.pdf	View	Download	
TX ID	12/31/9999	Accepted	Quill_Peter_TX ID_07202026_072820221042_.png	View	Download	
DOI	04/05/2023	Accepted	Quill_Peter_Doi_04052023_072820221042_.pdf	View	Download	
AHIP	02/16/2023	Rejected	Quill_Peter_AHIP_02162023_072820221041_.pdf	View	Download	
E&O	01/31/2023	Accepted	Quill_Peter_EO_01312023_072820221041_.pdf	View	Download	



Final Approval or Rejection

Step 1:

When the KCA Broker Support team has reviewed your documents and test score, you will receive an email notification for your approval to sell for KCA!



Hi _____,

All documents have been reviewed and approved. Congratulations, you are now ready to sell KelseyCare Advantage plans!

Thank you,

KelseyCare Advantage Broker Support Team
kcabrokersupport@kelseycareadvantage.com
713-442-4949
KelseyCareAdvantage.com



Step 2:

If the KCA Broker Support team rejects your onboarding application, you will receive a different email notification.

Subject: **Your certification has been rejected**



Hi _____,

We have reviewed all the documents that you've uploaded as part of the KCA certification process. Unfortunately, at this time we are not able to approve you to sell for 2023-All Benefits KelseyCare Advantage.

Thank you,

KelseyCare Advantage Broker Support Team
kcabrokersupport@kelseycareadvantage.com
713-442-4949
KelseyCareAdvantage.com





Frequently Asked Questions

Q: I didn't get the email invitation to onboard, what do I do?

A: Please check your spam/junk email folder. You may also search for "You're invited to onboard with KCA". If you are still unable to locate the email invitation, contact kcabrokersupport@kelseycareadvantage.com for a password reset

Q: I don't know what my AHIP expiration date is, what date do I use?

A: 12/31/2022

Q: What if I fail the certification test more than 3 times?

A: Send an email to kcabrokersupport@kelseycareadvantage.com to request another attempt

Q: How do I download the training materials?

A: You must first click the [View Training Content] button which prompts a pop up window to view the training materials in a slideshow format. Once you close that pop up window, you will have another button that says [Download Training Material] where you may download the pdf

Q: How long does it take to get approved after I've passed the test?

A: Typically, it will take 2-3 business days for the Broker Support Team to review/verify your documents. As we are mass onboarding agents to the new KelseyPortal, it may be a little longer

Q: Where can I view my Book of Business?

A: That functionality is currently not available, but we plan to make this available in September/October

Q: Where do I submit my 2022 applications?

A: Continue to submit applications online - <https://enrollment.kelseycareadvantage.com/>

If you have a paper application, send them to Apps@kelseycareadvantage.com

We plan to make enrollment submission through the KelseyPortal, available in September/October

Q: Why do I keep getting logged out?

A: The KelseyPortal is a secure site. You cannot open multiple tabs or multiple windows while logged in. For security purposes, it will log you out.